

# Reformed funding system

## Operational implications guidance for Local Authorities

# REFORMED FUNDING SYSTEM: OPERATIONAL IMPLICATIONS GUIDANCE FOR LOCAL AUTHORITIES

1. This guidance is to assist local authorities and their schools forums in planning the local implementation of the reformed funding system for 2013-14. It is essential that work on this starts now so that we can collectively achieve the benefits of issuing earlier budgets.

## Creating the new, simpler formula

2. Authorities need to decide what factors they wish to include in the new simplified primary and secondary formula from 2013-14 (the arrangements for high needs, including special schools, will be very different and are covered at paragraphs 32 to 46. Arrangements for early years are mentioned in paragraph 47). A useful first step may be to **identify all factors in their current formula which are not compliant** with those allowed under the new system. They will need to **determine how to allocate all funding through factors which are allowable** and plan the balance between those factors. They should keep a clear record of how any changes have been made, showing any movement within the total ISB between factors and phases.
3. The list of allowable factors is:
  - a. A basic per-pupil entitlement – there will be a single unit for primary aged pupils and either a single unit for secondary pupils or a single unit for each of key stage 3 and key stage 4, so authorities may wish to plan for both scenarios.
  - b. Deprivation, measured by Free School Meals (FSM) and/or IDACI
  - c. Looked after children
  - d. Prior attainment as a proxy measure for SEN (notional SEN budgets can still also include funding allocated through pupil numbers and deprivation; see paragraph 33)
  - e. English as an additional language, for a maximum of 3 years after the pupil enters the school system
  - f. A standard lump sum for each school, with an upper limit between £100,000 and £150,000
  - g. Split sites
  - h. Rates, which may be at actual cost
  - i. Private finance initiative (PFI) contracts
  - j. For the 5 local authorities<sup>1</sup> who have some but not all of their schools within the London fringe area, an uplift to enable higher teacher pay scales in those schools to be reflected

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<sup>1</sup> The 5 local authorities are Buckinghamshire, Essex, Hertfordshire, Kent and West Sussex

4. **Deprivation** - We have identified Free School Meal Eligibility and IDACI (with the option for banding) as the two deprivation indicators. This data can be found on the School Census at pupil level. We will be providing school level data relating to maintained schools and recoupment Academies to local authorities at the end of April in order that they can model the new approach locally.
5. **Looked After Children** - We are aware that not all local authorities know how many looked after children they have in their schools that have been placed there by other authorities. To overcome this data issue we will be providing data collected from the SSDA903 mapped to schools at the end of April. This will enable local authorities and the EFA to identify the number of looked after children in each school/academy.
6. **English as an Additional Language** - We are aware that local authorities and the EFA may not be able to easily identify pupils with EAL who have only been in the maintained system for up to 3 years. We will therefore provide EAL data for pupils who have been in the system for 1, 2 or 3 years to local authorities. This will be calculated using the National Pupil Database (NPD) and will be aggregated to school level and also provided as a percentage. This data will be available at the end of April.
7. **Low cost, high incidence SEN** - We have agreed that local authorities can use Early Years Foundation Stage Profile (EYFSP) results and Key Stage 2 as a proxy for low cost SEN. For primary schools, funding can be targeted at pupils who achieve fewer than 78 points on the current EYFSP and are therefore not considered to be developing well. For secondary schools, funding can be targeted at pupils who achieve a Level 3 or below in English and mathematics. We are aware that local authorities may not have prior attainment data for pupils who have transferred from other local authorities; therefore we will make this data available at the end of April. The data will be based on the latest EYFSP and KS2 assessments.
8. We will be issuing, before the end of April, a tool to assist authorities in modelling a new formula, together with detailed datasets for maintained schools and Academies in their area. This will include further technical guidance on the definitions.
9. There will be a process for authorities to request additional factors for exceptional circumstances connected with premises (see paragraph 15), but the scope of this will be very restricted.
10. It is a requirement under the current system for local authorities to have formula factors for new, reorganised and closing schools. In the reformed system, such additional funding will not form part of the formula because these situations are infrequent and best calculated on

a case by case basis. Instead, funding can be held within contingencies for maintained schools.

## New delegation

11. Several budget items which can currently be retained centrally will have to be delegated through the formula from 2013-14. Authorities will, therefore, for each of these **need to identify how funding will be delegated through allowable factors**. To ensure that an accurate baseline for the MFG can be calculated, **the total of additional delegation and how it is to be distributed** (for example, £50 per pupil plus £100 for each FSM pupil) will need to be clearly identified.
12. The section 251 budget lines which will now have to form part of the school formula if they are currently funded centrally are:
  - Funding threshold and performance pay;
  - 14-16 practical learning options;
  - School meals (primary/special; secondary is already delegated);
  - Support for schools in financial difficulties;
  - Allocation of contingencies;
  - Free school meals eligibility;
  - Insurance;
  - Licences/subscriptions;
  - Staff costs - supply cover (long-term sickness, maternity, trade union and public duties);
  - Support for minority ethnic pupils or underachieving groups;
  - Behaviour support services;
  - Library and museum services
13. Some of these budgets could subsequently be retained centrally on behalf of maintained schools if they so choose (see paragraph 26), but must initially be in the formula calculation. They will form part of Academies' delegated budgets from the outset and so there will be no need for a schools budget LACSEG calculation.
14. Authorities in conjunction with their schools forums will need to decide for themselves whether or not to undertake a **full review** of their formula or just review those factors which will not be allowed in the new system (paragraph 2) and those central budgets which must be added to the formula (paragraph 12). We are aware that a number of authorities have recently developed "needs-led" or "activity-led formulae" and may only want to take an incremental approach to this. A more fundamental review may however be more appropriate where:
  - there have been no significant changes to the formula for a number of years
  - allocations are still being made on the basis of how grants were

distributed historically

- a large proportion of the budget is allocated through factors which will no longer be allowable
- a large amount of expenditure on central budgets must now be included in the formula.

## Requesting exceptional factors

15. There will be a process by which authorities can request the inclusion of additional factors in their formula for exceptional circumstances. The regulations will restrict the additional factors which may be approved: we are intending that they will only apply to cases where the nature of the school premises gives rise to a significant additional cost greater than 1% of the school's budget, and where such costs affect fewer than 5% of the schools in the authority (including Academies).
16. On this basis, Authorities will need to decide **whether there are any exceptional formula factors where they would wish to put a case to the Education Funding Agency (EFA)**. If other cost pressures emerge, then we would expect this to be dealt with in the short term through the MFG or the usual arrangements authorities have with their schools – such as internal loan schemes. Academies in financial difficulty would continue to contact the EFA.

## Pupil-led funding

17. We have asked in the consultation whether we should apply a minimum percentage (60%) to be allocated through age-weighted funding or a minimum percentage (80%) to be allocated through all pupil-led factors. **Authorities will therefore need to calculate the proportions of the formula allocated through age-weighted funding and all pupil-led factors.**

## Primary/secondary ratio

18. We are not at this stage prescribing constraints on the primary/secondary ratio, but authorities should be aware of where they are within the range in case we limit the ratio from 2014-15. **Authorities will therefore need to calculate the primary/secondary ratio, using the total budgets for all maintained schools and Academies divided by the total number of pupils in each phase.** We would expect middle school budgets to be apportioned between the phases.

## Modelling protections and limits to gains

19. The Minimum Funding Guarantee (MFG) will continue to be set at minus 1.5% per pupil in 2013-14 and 2014-15. We will, however, be substantially simplifying the calculation. We will only exclude factors from the MFG where not doing so would result in excessive protection or not be consistent with other policies.
20. As set out in the next steps document, the only factors which will automatically be excluded from the MFG are:
  - post-16 funding;
  - allocations from the High Needs Block, including those for named pupils with SEN and special units; and
  - the lump sum.

All other funding will be in the MFG baseline and there will be no other adjustments as there are at the moment for non pupil-led funding (80% for primary schools, 87.5% for secondary schools) or small schools.

**Authorities need to model the new formula using the MFG of - 1.5% per pupil, with the exceptions shown in this paragraph.**

21. Where a service was previously centrally funded and is being delegated to maintained schools in 2013-14, then this additional funding will need to be excluded from the MFG. This is so that the MFG is calculated on a like for like comparison, and that schools see the benefit of the additional funding. **Authorities need to ensure that new delegation is excluded from the MFG calculation in 2013-14.** We would exceptionally consider applications not to do so if this would otherwise have the effect of continuing very high levels of protection.
22. In the case of Academies, the additional delegation will replace Schools Budget LACSEG. The EFA will calculate a baseline including Schools Budget LACSEG for Academies' MFG. For the purposes of recoupment in 2013-14, authorities should exclude this new delegation when calculating the MFG Academies would have received as a maintained school.
23. As we said in the next steps document, we will consider exceptional requests to disapply the MFG only if there is a significant change in a school's circumstances or pupil numbers. So, in the case of rates, for example, this could only be considered if there was a rating revaluation or there was a significant change as the result of a change of status. In the case of PFI schools, there is generally little variation in the unitary charge once the school is up and running, so there is only a case for excluding the factor if it is being introduced for the first time or there is a substantive change in the contractual amount due as a result, say, of an extension. This would then enable increased allocations through these factors to benefit the schools rather than be absorbed within the protected amount where the schools receive MFG. The EFA on behalf of the Secretary of State will consider such **exceptional** requests.

**Authorities will need to consider whether to submit requests to disapply the MFG for specific factors or schools;** we will clarify when we are able to start considering applications.

24. As school budgets will in future be based on the October pupil count, the MFG will need to reflect this date as well instead of the January count as at present. There will therefore need to be a rebasing of the school's 2012-13 budget so that this is divided by its October 2011 pupil numbers to form the baseline against which its 2013-14 budget is compared.
25. As there could be significant amounts of protection required in some areas as a result of the formula simplification, we will be allowing overall gains for individual schools to be capped or scaled back to make it easier to run the formula. At present, there can only be transitional arrangements for changes to individual factors rather than the whole formula. **Authorities and their schools forums will therefore need, as part of their formula modelling, to determine whether and how to limit gains.**

## **Optional de-delegation for maintained schools**

26. There are some services where maintained schools will be able to decide that some funding should be retained centrally rather than delegated. These are:
  - Contingencies (including support for schools in financial difficulties and to support basic need pupil growth);
  - Free school meals (FSM) eligibility;
  - Insurance;
  - Licences/subscriptions;
  - Staff costs - supply cover (long-term sickness, maternity, trade union and public duties);
  - Support for minority ethnic pupils or underachieving groups;
  - Behaviour support services;
  - Library and museum services
27. For each of these, it would be for the schools forum members in the relevant phase (primary or secondary), to decide whether that service should be retained centrally. The decision would apply to all maintained schools in that phase and would mean that the funding for these services was removed from the formula before school budgets were issued. **Authorities will, therefore, need to discuss with forum members representing maintained schools, whether there are any services in paragraph 26 which the schools wish to be retained centrally.** Academies would of course be free to buy back into local authority services, as is the case for maintained schools where funding remains delegated.

28. **For each service retained centrally, authorities will need to make a clear statement of how the funding is being taken out of the formula** (for example – primary insurance £20 per pupil, secondary behaviour support services £30 per FSM pupil). There should be a clear statement of how contingencies and other resources will be allocated. Academies will continue to receive a share of funding for these services in their delegated budget.
29. Where there has been agreement that a school is entitled to a contingency allocation, that agreement should be honoured if it converts to an Academy. We may take such decisions into account in making recoupment adjustments.
30. Many local authorities are experiencing significant increases in primary pupil numbers, which are sufficient to require schools to take on additional classes. Given that authorities have a duty to secure sufficient school places, we will be allowing them, with the agreement of the schools forum, to retain funding centrally through contingencies for additional maintained primary school places. The EFA will make separate arrangements for Academies facing increased costs due to pupil growth, and local authorities are not expected to provide contingency for this purpose.
31. Special schools will not in future have delegated budgets on the same basis as primary and secondary schools. They will get £10,000 per place, plus top-up funding for each pupil they have, from the commissioner to make up the rest of their budget. The principle of the new system for high needs pupils is to make costs comparable between schools so that they don't distort placements, so de-delegation is not consistent with this framework.

## **SEN, learning difficulty and disabilities (LDD) and alternative provision (AP)**

### ***SEN as part of mainstream funding formula***

32. We have set out in the next steps document that lower needs SEN will continue to be funded from schools' delegated budgets. There is, however, a variety of practice between authorities on the level of SEN delegation. Future decisions will need to be consistent with the proposals set out for funding from the High Needs Block. **Authorities will therefore need to decide on the maximum level of funding to be provided by mainstream schools above which pupils will get support from the High Needs Block. Our recommendation is £6,000 for each pupil.** Consistency between authorities in this respect will improve the experience of pupils with SEN who transfer between areas.



33. Mainstream schools will continue to have a “notional SEN budget” and this will be linked to the local offer. The way in which this is derived may need to be reviewed to be consistent with the new limitations on formula factors. The “notional SEN budget” may include some age-weighted and deprivation funding, together with any specific SEN factors based on prior attainment. **Authorities will, therefore, need to define the “notional SEN budget” as part of their wider mainstream formula review.**
34. There may be some cases where the formula does not adequately reflect the number or needs of SEN pupils in mainstream schools. This may happen particularly where a school develops a good reputation for SEN and attracts many SEN pupils, but this is hard to reflect in the formula. The circumstances in which local authorities may provide such additional funding should be defined locally as part of the work on defining a local offer of SEN and LDD provision. **Authorities should therefore consider whether they need arrangements for providing additional funding to some mainstream schools or Academies from their High Needs Block.**
35. All the arrangements set out above will form part of the “local offer” for SEN and LDD and will, therefore **need the agreement of local schools, Academies and post-16 providers** to ensure that high needs pupils and students, including those with SEN or LDD, and their parents are treated properly and consistently. As part of this, there will need to be clarity on what should be supported from mainstream schools’ “notional SEN budget”. This discussion may well need to go beyond schools, colleges and the Schools Forum to include representatives of parents and local charities and voluntary organisations.

### ***High needs SEN pre-16***

36. As part of authorities’ work with the EFA on calculating the baseline for the high needs block (see paragraph 60), **authorities will need to determine the number of places in maintained special schools and in special units or specially resourced provision in maintained mainstream schools that they intend to fund in 2013-14.** In the reformed funding system, each agreed place will attract a base level of funding of £10,000, and therefore we will need to reflect this in the baselines so that the EFA and local authorities can pay the providers for whom they are responsible.
37. Funding beyond this will take the form of top-ups for individual pupils rather than of a conventional funding formula. It will, therefore, be necessary for each authority to review the funding for its maintained special schools, and its special units or specially resourced provision in maintained mainstream schools to take account of the new arrangements of £10,000 base funding and top-up funding.

**Authorities should look at the 2012-13 budgets of their maintained special schools, special units and specially resourced provision, rework them as £10,000 base funding plus top-up funding so as to determine required top-up levels for each type of place, and discuss them with the providers.** While there will not be a MFG as such for special schools and units, there will be a requirement that top-ups are set at such a level that, if all the places were filled and the pupils came from the maintaining authority, the school's budget would reduce by no more than 1.5% in cash.

38. As special Academies and Academies with special units or specially resourced provision will be funded on the same basis, **authorities should also work with those Academies that it formerly maintained to help them determine the new funding rates.**
39. The reformed system means that inter-authority recoupment will be replaced by direct funding relationships between the commissioner and the provider. **Authorities should therefore work with providers and neighbouring LAs on the transition from recoupment to direct commissioning payments.** It will be particularly important for providers not using the local authority's bank account to have assurances of prompt payment so that they can manage their cashflow. Authorities will want to make accurate assessments of accruals for outstanding recoupment payments at the end of 2012-13.

### ***Alternative Provision***

40. As with High Needs SEN, **authorities will need to determine the number of places** in maintained and funded AP to report to the EFA. Each agreed place will attract a base level of funding of £8,000.
41. Pupil referral units (PRUs) will be receiving delegated budgets for the first time in 2013-14, so in many areas there may not be a clear budget funding them. The level of budget they will need will include all services delegated to other schools; the services will include finance, payroll, HR and ICT which may be only notionally allocated as recharges at present, as well as those set out in paragraph 12. **Authorities will, therefore, need to identify the funding needed for PRUs to operate delegated budgets in 2013-14 then rework them as £8,000 base funding per place plus per-pupil top-up funding so as to determine appropriate top-up levels in consultation with the PRUs.**
42. **Authorities will need to undertake the same exercise of calculating the appropriate top-up for and with other maintained alternative provision.**

### ***High needs SEN and LDD post-16***

43. As part of the baseline reporting to the EFA, **authorities will need to**

**determine the number of high needs pupils placed in maintained mainstream school sixth forms and the number of 16-19 places funded in maintained special schools or special units and specially resourced provision in maintained mainstream schools that may be funded at present through the 16-18 SEN Block Grant.**

44. Authorities will take on greater responsibility for funding post-16 provision for high needs pupils and students from the 2013/14 academic year. As such, **authorities will need to work with providers, other local authorities that commission provision from the same providers, and the EFA to calculate appropriate future levels of top-up funding.**
45. Furthermore, as local authorities become more active commissioners of post-16 high needs education provision, **authorities will also need to review existing systems and processes for arranging post-16 provision for high needs pupils and students**, including through discussions with providers, other local authority commissioners, and the EFA, so as to ensure that these arrangements are proportionate, do not create unnecessary administrative burdens for providers, do not duplicate processes that are carried out by other bodies, and secure the most efficient use of public funds.

### ***Banded funding frameworks***

46. As we have set out in *School Funding Reform: Next steps towards a fairer system*, we think a key role will be played by banded funding frameworks with local tariffs in the effective operation of the place-plus funding approach. As such, **authorities should work with maintained and state-funded providers, as well as with other authorities that commission provision from the same settings, to develop effective, transparent banded funding frameworks with local tariffs.** Many local authorities operate local banding frameworks in relation to high-level SEN provision in schools, but authorities will also need to develop local banding frameworks in areas such as AP and LDD.

### **Early Years**

47. We are not proposing major changes to the main elements of the Early Years Single Funding Formula (EYSFF). We will continue to allow different base rates for different types of provision, and will continue to allow specific early years factors for quality, flexibility and sufficiency. There will continue to be a mandatory deprivation supplement in the EYSFF, and we will continue to allow flexibility in the indicators used, except that we will **require that it must be based on child level definitions of eligibility**, rather than operating a supplement based on the characteristics at setting level. In line with the main formula, we will

be constraining other factors, such as those relating to premises. **Authorities should therefore review their early years formula and remove factors which are no longer allowed.** We will consider requests to retain **other factors for the early years formula** only if this causes significant problems.

## Ensuring schools forums are properly constituted

48. We are continuing the requirement in the schools forum regulations that maintained primary schools, maintained secondary schools and Academies should have broadly proportionate representation according to the pupil numbers in each category. We are concerned, however, that the composition of some schools forums has not changed quickly enough to reflect the increased number of Academies. We appreciate that members have been elected to terms of office of a particular length, and that it can be disruptive to be continually re-electing members. Nevertheless, it is imperative that the forums which consider the simplified 2013-14 formulae are properly representative. **Authorities should, therefore, ensure that the composition of their schools forum is compliant with the regulations and reflects the pupil numbers expected to be in each category at 1 September 2012. Any required elections should take place before the end of the summer term.**

## Changes to schools forums

49. We have set out in the next steps document that for 2013-14 that we will make some amendments to the Schools Forums Regulations. It is our intention that these should come into force in September 2012 in time for the final forum discussions relating to the 2013-14 formula. In terms of membership and participation, we intend to:
- a) Remove the requirement to have a minimum of 15 people on a Forum;
  - b) Restrict other local authority attendees from participating in meetings unless they are a Lead Member, DCS, DCS representative or are providing specific financial or technical advice (including presenting a paper to the Forum);
  - c) Restrict the voting arrangements by allowing only schools members and the PVI members to vote on the funding formulae;
50. On the first of these, **smaller authorities in particular may therefore wish to review the total size of their forum and decide whether to reduce the number of members below 15.**
51. The other two changes relate to participation in meetings and voting so **authorities will need to review their forum procedures or standing**

**orders to ensure consistency with the regulations.**

52. We have also said that we will give the EFA observer status at School Forum meetings to support the local process and to provide a national perspective if members thought it helpful or if there were any concerns about the running of the Forum.

## **Transparency of schools forums**

53. We have also said that we need to ensure that forum meetings are more transparent. We know that many authorities run effective forums , but are aware that in some areas there is not such good practice and that schools have found it difficult to find out what is going to be, or has been, discussed. We will therefore amend the regulations as well to:
- (a) Require local authorities to publish Forum papers, minutes and decisions promptly in a public area of their websites; and,
  - (b) Require Forums to hold public meetings – as is the case with other Council Committees

**Authorities should, therefore, take immediate steps to ensure that access to, and details of, meetings from now on are compliant with the new regulations. Any regular communications from the authority to schools should also draw attention to forthcoming schools forum meetings and agendas, and the minutes of forum discussions.**

54. It is also incumbent on each group of schools forum members – whether, for example, maintained primary school governors, Academy or early years PVI members, to ensure that they communicate with the people or organisations they represent at least before debating major issues and again afterwards. Authorities may be able to facilitate such communication, for example through early years networks or governor newsletters, where such channels do not currently exist. **Authorities and schools forum members should consider whether communication within the groups represented can be improved.**

## **Consulting on the new formula**

55. Regulations currently require only the schools forum to be consulted on the formula and yet all maintained schools have to be consulted on changes to the scheme for financing schools. We know that most authorities consult much more widely on formula changes. We believe that all maintained schools and Academies should be consulted on formula changes (and all early years providers as well in relation to the Early Years Single Funding Formula), and any consultation should include a demonstration of the effect of modelling such changes

(including and excluding the MFG) on individual maintained schools, Academies and early years providers. **Authorities should, therefore, ensure that they communicate proposed formula changes to all bodies affected by the changes.**

## Completing the proforma

56. Having agreed the formula, **authorities should submit the proforma containing information about their simplified formula to the EFA** by 31 October 2012. This will then be checked for compliance with the regulations and there may then need to be a further dialogue between authority and EFA. **The authority will need to send any changes to the EFA** by mid January 2013 once the October pupil numbers are confirmed and the DSG settlement announced. The only changes between the provisional and final versions should be for the unit values, not the factors used.

## DSG allocations – checking the baselines

57. As noted in the next steps document, we will be separating the DSG into three notional unringfenced blocks in order to speed up the process of calculating budgets. The notional blocks for high needs and early years will be based on the authority's section 251 statement for 2012-13, with the balance forming the schools block and totalling back to the final DSG allocation for the year. We will also be adding in some post-school high needs funding currently held by the EFA.
58. The starting 2012-13 baselines will be calculated from the following section 251 lines in the LA table and columns in the schools table:

### High Needs Block

- Delegated budgets of special schools
- Centrally funded provision for individual pupils
- SEN support services
- Support for inclusion
- Independent special school fees
- Inter-authority recoupment
- Pupil referral units
- Education out of school
- Delegated allocations relating to individual pupils – Individually Assigned Resources
- Delegated allocations relating to special units and specially resourced provision in mainstream schools
- SEN transport (where charged to the schools budget)
- Other central budgets relating to special schools

- Post-16 SEN expenditure
- Adjustments will be made for base funding of high needs places in provision not maintained by the authority, but to which it sends pupils
- Additions will be made for budgeted spend on high needs students aged 16-25 in further education (FE) providers and independent specialist providers (ISPs) held by the Young People's Learning Agency (the top-up element)

### **Early Years Block**

- Provision for three and four year olds in delegated budgets – the total in the Early Years Single Funding Formula
- Early years contingency
- Central expenditure on under 5s
- May exclude High Needs Pupil funding where this has been shown in the above lines

**Authorities should, therefore, ensure that their section 251 budget statement for 2012-13 is completed accurately and should pay particular attention to these headings**

59. Once we have collected section 251 statements, we will issue each authority with what we believe is their baseline for each of the notional blocks. **Authorities should at that point check their figures and there will be opportunity for a dialogue with the EFA if they disagree with them.**
60. We will also be carrying out a separate data collection for the number of funded places in special schools and units, and in alternative provision. This information will be used to calculate the base element within the notional high needs block. We will provide further guidance on this in due course. **Authorities should therefore prepare to calculate the number of funded places in high needs provision (see also paragraphs 36, 40 and 43).**

### **In-year adjustments**

61. Some formula factors (for example, rates and PFI) may be based on actual cost and these costs can change after budgets have been determined. In these situations, the adjustments relating to that year would be made retrospectively to the following year's budget rather than changing the budgets once they were issued. Authorities would need to notify the EFA of any changes relating to Academies so that they can apply similar adjustments.
62. Where a local authority makes additional funding available to its schools during the course of the year – for example, to settle equal pay

liabilities – it must notify the EFA of the method it has used to allocate the additional funding within the regulations.

## **Support for implementation**

- 63. As this represents a significant change to the local operation of school funding, we are aware that we need to provide support to authorities as they move to implementation.
- 64. Questions about the detail and practical implications of implementation should be sent to:

[reform.schoolfunding@education.gsi.gov.uk](mailto:reform.schoolfunding@education.gsi.gov.uk)

Any formal responses to the consultation should be sent to:

[schoolfunding.consultation@education.gsi.gov.uk](mailto:schoolfunding.consultation@education.gsi.gov.uk)

- 65. As noted in paragraph 8, we will be making available in the next few weeks a tool and relevant datasets to assist authorities in their modelling.
- 66. We think the regional meetings of local authority finance officers are a valuable opportunity to discuss practical issues further. We have been in touch to ensure the regional groups meet as soon as possible in April or May, where they were not already doing so, and we undertake to send an official to each meeting. Please make every effort to attend one of the meetings.
- 67. We will be also providing workshops at the Fair Funding Conference on 23 May in Reading.
- 68. We will confirm the outstanding decisions on issues such as separate rates for Key Stage Three and Four, and whether we will be requiring minimum percentages allocated through age-weighted or pupil-led funding, as soon as possible after this consultation closes on 21 May.



## Summary Timetable

69. To conclude, it might be helpful to set out the key points in the timetable leading through to next year's budgets:

Mar-Apr:	LAs complete section 251 budget statements
Apr-Jun:	LAs undertake detailed modelling of new formula in conjunction with schools forums
May-Sep:	LAs able to requests exceptional factors and MFG exclusions to EFA
Jun- Oct:	Consultation with all schools and Academies on new formula
By Jul:	Reconstitution of schools forums where necessary
To Sep:	EFA will confirm baselines with LAs once section 251 statements have been submitted
End of Oct:	LAs submit pro-forma to EFA
Dec:	Census data and schools/high needs blocks confirmed
Mid Jan:	LAs submit any final changes to pro-forma to EFA

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